



Adobe Acrobat and PDF files:

an essential part of your legal technology arsenal

Today, it is impossible to spend even a few minutes on the Web without coming across a PDF document. This file format is the universal standard for sharing documents, and is already used by many lawyers. In the future, PDF documents are going to become even more widely used in the legal profession. This article will help you understand what PDF files are, and how you can use them in your practice.

What is a PDF file

The PDF file started out as the simple solution to a common problem. Undoubtedly, you have experienced the frustration of not being able to access a computer file someone else created because you didn't have on your computer the same program they used to create it in the first place. Or perhaps, a program on your computer could access the file, but some of the formatting was lost, or it would not print properly. This remains a common problem today, and was an almost universal problem in the waning days of DOS in the early 90s.

In 1993, Adobe developed a solution to this problem: the Portable Document Format, or what is more commonly known as the PDF file. These files are easily recognizable

as the last three letters of the file name are always PDF (e.g. letter.pdf).

Adobe's timing could not have been better. In 1993, the Internet was just starting to take off, and the world was starving for a solution to the problem of exchanging documents. PDF documents worked well with Netscape, the new and soon-to-be very popular Web browser that made the Internet easily accessible to everyone. As a result, the PDF format has become the universal standard for exchanging documents.

What is a PDF document? It is really nothing more than a frozen version of the original document you created on your computer. If you have the proper software, you can create a PDF file from a document in virtually any program and save it, text, fonts, graphics, layout and all, in a format that anyone can read, even people using the Mac, UNIX, LINUX or Palm operating systems. The key is that a PDF document will look, and print, exactly as it appeared on your computer for everyone who views it. This is the case, even if viewers do not have the original program you used to create the document on their computer.

To view and print a PDF file, all you need is Acrobat Reader. This free program is available as a download from Adobe's

Web site (www.adobe.com). It works seamlessly with Windows and your Web browser. When you access a PDF file on your hard drive or the Web, the Reader automatically starts and opens the file so you can view it on the screen. Posting a PDF document on the Web assures that almost anyone can access it, as the Adobe Reader is installed on several hundred million computers world-wide, including, most likely, yours.

You can't create PDF files with the free Acrobat Reader. Adobe has a separate program for creating PDF files, the latest version of which is called Adobe Acrobat 5.0. It costs about \$375. Installing it gives you the ability to easily create a PDF file from just about any program you use.

How can lawyers use PDF files

As PDF files are universally accessible, PDF is the only format you should consider for posting documents on your firm's Web site.

The Internet and e-mail have come together to make it common practice for lawyers and clients to exchange final or draft documents electronically as attachments to e-mail messages. Although

sending documents by e-mail is far more convenient than using a fax machine or regular mail, it is something that should be done with care, and in some circumstances, ideally with a PDF file.

In some situations you will want the other person to be able to easily edit the document you are sending them. Perhaps you are sharing a draft document with a client or co-counsel, and you want them to be able to make changes to that document. If this is the case, sending them a document they can edit, say a Word or WordPerfect document, is appropriate.

However, there are circumstances where you will want to send a document that can't be easily changed or edited. Perhaps you don't want to give a difficult client a draft they can change, or you want to send opposing counsel a final document that cannot be altered. In this case sending it in PDF format is the answer. It will retain all original formatting, and the contents will be frozen and unalterable.

If you have the ability to create PDF documents, and your recipient has an e-mail account and the Adobe Reader, you should seriously consider e-mailing PDF documents instead of using a fax machine. E-mailing a PDF will be faster than faxing, and it will be cheaper (especially if you have to send the fax long distance). The quality of the document will be virtually identical to the one you printed, unlike faxes, which can be difficult to read. Lastly, e-mailing multiple parties is much easier than sending a fax to multiple parties.

PDF security, integrity and safety

You can change and set various security options on a PDF document to accomplish a number of different things. Access to a

document can be prevented and controlled with passwords. You can prevent people from changing a document, printing it, or even copying the text it contains. For document integrity and identity purposes, you can digitally sign a PDF document. With proper security settings, PDF files are as tamperproof as originals.

Providing the file hasn't been secured, you can easily extract text or images from a PDF file, something Adobe calls re-purposing.

PDF documents are safe – they cannot carry a virus. This is great comfort for anyone receiving a PDF document as an e-mail attachment. Keep in mind that many people will not open a Word document or other attachments fearing that they will contain a virus. In some companies and law firms, security settings are set to only allow attachments that are PDF documents; all others are automatically stripped out of a message.

More advanced PDF document features

Adobe Acrobat has many other features and abilities that make it potentially useful for lawyers. These include:

- inserting annotations or comments in a document, which can be used by you or others;
- creating interactive court pleadings that include internal and external links;
- creating interactive forms for a Web site;
- the ability to facilitate online collaboration by allowing content on a Web site to be accessed by others.

Some small firms are using Adobe Acrobat as the foundation of a paperless office. All documents are scanned into PDF format

and placed on a network. This gives everyone at the firm access to all the documents on the matter. There is a program that allows you to OCR (Optical Character Recognition) a scanned document to convert it to text. This gives you the ability to search for text within PDF documents.

Acrobat can be used by litigators for document production. A program called StampPDF (www.appligent.com) allows you to automatically Bates Stamp all documents in a PDF file. It can stamp thousands of documents in a matter of seconds, a fraction of the time it takes to do it manually.

As a result of its abilities, the PDF format has been designated as the required standard e-filing format in almost every jurisdiction that has implemented e-filing, whether for courts, tribunals or other government agencies.

Take steps to learn to use PDF documents

The PDF document is already the universal cross-platform format for document exchange. It ensures that every document you create can be shared with anyone in an easy-to-use format. As more people become comfortable with PDF documents, and learn to use the more advanced PDF document features, this document format will become even more common. Take steps to learn how you can use PDF documents in your practice. They will help you work more efficiently and effectively.

Dan Pinnington is Director of practicePRO, LAWPRO's risk and change management program. He can be reached at dan.pinnington@lawpro.ca